

PROBATE EXPRESS

Client Information Form

INTRODUCTION

This form is a guide to the issues that are considered as part of the estate administration process and the information we require to prepare an application for a grant of probate or letters of administration.

YOUR DETAILS

Provide a copy of your licence or other identification

Title Mr Mrs Ms Miss Dr

Full name

Email address

Street Address

Suburb/City

State

Postcode

Postal Address:
(if different from above)

Suburb/City:

State

Postcode

Contact Numbers: (h)

(m)

Date of Birth

Relationship with the Deceased

DECEASED'S DETAILS

Title Mr Mrs Ms Miss Dr

Full name

Was the Deceased known by any other names?

Date of Birth

Date of Death

Last Residential Address

(if different from address in will, how long has deceased lived at the later address?)

yrs

Tax File Number

Current accountant (if any)

Marital Status

Married

De-facto

Divorced

Widowed

Single

Full Name of Spouse *(if applicable)*

DEATH CERTIFICATE

Has a death certificate issued?

Yes - provide a copy by email

Do you have the original? Yes No

If no, who holds it?

No - provide a copy by email once received and the original will be required

LAST WILL

Did the deceased leave a will?

Yes- provide copy by email

- a. Date of will
- b. Location of original will
- c. If you do not hold it – Executor/s to sign [Authority to Release Documents form](#)
- d. Details of Executors

Executor 1

Insert "as above" if you are an executor

Executor 2

Executor 3

Executor 4

- e. Any other documents containing testamentary wishes - letters/notes/unsigned wills?

No

Download a factsheet on Intestacy [here](#)

DECEASED'S ASSETS

Ensure all assets are safe, secure and insured

Asset Description	Approximate Value
Jointly held e.g. the family home, household contents etc.	
Individually held e.g. bank accounts, shares etc.	
Other assets e.g. discretionary trusts etc.	
Superannuation e.g. industry fund or Self-Managed Super Fund	
Life Insurance e.g. company, policy number/owner, life insured, beneficiary	
Debts owed to the deceased e.g. are there any personal loans to be repaid?	

DECEASED'S DEBTS/LIABILITIES

Description	Approximate Value

GENERAL COMMENTS

General comments about the deceased or the administration of the estate.

Indicate what steps you would like us to take:

Only obtain probate/letters of administration

Obtain probate/letters of administration and collect funds

I would like to arrange a meeting to discuss the administration of the estate

Unsure – provide your most convenient telephone number and we can ring you to discuss

NEXT STEPS

1. Email completed form to **probateexpress@mcw.com.au**
2. We will email/telephone you to confirm receipt and clarify any necessary details
3. Once we hold all necessary documents and information we will:
 - Forward confirmation of instructions and costs agreement to you to sign
 - Prepare the relevant documents
 - Arrange for documents to be signed and advertising to be done.

If you have any further questions, please contact



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